TOOL 2.3.8: Explaining the next steps | Exploratory meeting business information pack
PURPOSE: A team member script for the personal client manager to use in the exploratory meeting with the potential client. This guide provides a framework for clarifying the next steps where the potential client is to proceed to the discovery step. This should be used as a guideline to develop your own personalised version.
**Business tool for internal use only (not for client use/view)*

EXPLAINING THE NEXT STEPS

TODAY

- ☐ Firstly, I would like to obtain some additional personal information and gain your written agreement to proceed to the discover stage
- ☐ The additional personal information form is to be completed
- ☐ The agreement to proceed to the discover stage is completed
- ☐ A time and date for the discovery meeting is agreed. Preferably the date is agreed for around <two weeks> after the exploratory meeting

WITHIN THE NEXT FEW DAYS

Within the next few days, you will receive a letter confirming your agreement to proceed and the details of the discovery meeting. It will also include the discovery meeting information pack, which contains a meeting preparation guide, what to think about prior to our meeting, and an outline of what we will cover.

WITHIN THE NEXT 7 DAYS

As we explained, the discovery meeting provides us with a further opportunity to understand how we can work together, as well as make an informed decision whether it is appropriate to proceed to the next step – the preparation of your advice. You should allow up to <2> hours for this meeting.

We will also outline the next steps to keep moving forward.

In the meantime, we are always available to answer any questions you have.

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Invite the potential client to ask any questions they have before concluding the meeting.

Explain how enjoyable it was meeting with the potential client and show excitement about the potential results you can achieve together. Accompany them to the entrance/lift.

FOLLOWING THE CONCLUSION OF THE MEETING

Personal client manager is responsible for gathering all notes taken during the exploratory meeting, scanning these documents and storing in your CRM system/software. Hard copies of all notes are placed in hard copy file (or scanned and saved, depending on your business protocols).

Dates and the time of the discovery meeting are entered in the senior adviser and associate adviser's calendars and meeting room booked.

NOTES

Personal client manager notes that may require future action: